



Optix 5

MacOS

Quick Reference Guide

Database Screens

Text Search

Queue Processing

Foldering

Workflow

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FINDING A FILE OPTIX FILESYSTEM APPLICATION

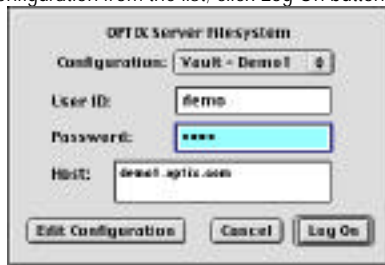
SELECT FILESYSTEM (MacOS or OPTIX FILESYSTEM)

Start up Optix Server/Local Filesystem application or choose Filesystem



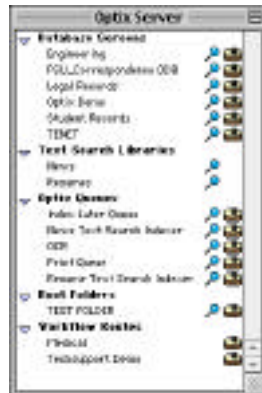
LOG ON TO SERVER (OPTIX FILESYSTEM)

Enter user name, password and server, or Choose configuration from the list; click Log On button



SELECT QUERY OPTION (OPTIX FILESYSTEM)

- OPTIX application Filesystems Window - use Popup List to select query option:
 - Database Screen
 - Text Search Library
 - OPTIX Queue
 - Root Folder
 - WORKFLOW Route



- OPTIX Filesystem application - use Filesystem Window to select query option

With filesystem, server & screen,

File Query (CMD-O):

- For MacOS filesystem, displays Open dialog
- For OPTIX Filesystem, starts query with option

DB Screen Buttons

STRUCTURED INDEX Query

- Cancel Cancels query and closes query screen
- Query Starts search for index records
- Clear Clears query screen
- Options Show query options (saved queries, etc.)

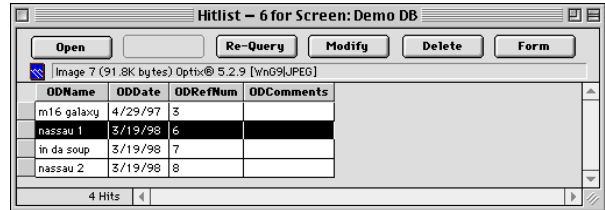
STRUCTURED INDEX Search Operators

WILDCARD Search Operators

- ? Wildcard for ONE character (text ONLY)
- _ (underscore) Wildcard for ONE character (text ONLY)
- * Wildcard for ZERO OR MORE characters (text ONLY)
- % Wildcard for ZERO OR MORE characters (text ONLY)
- ___|___ Search for ___ OR ___
- ___:___ Range search from ___ TO ___
- =___ Search for EXACT MATCH of ___
- ! =___ Search for anything NOT exact match of ___

BOOLEAN Search Operators

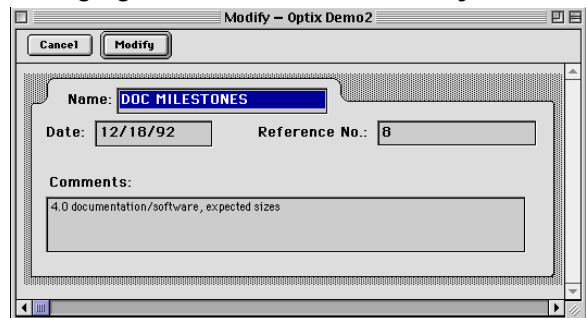
- < ___ LESS THAN ___
- <= ___ LESS THAN OR EQUAL TO ___
- > ___ GREATER THAN ___
- >= ___ GREATER THAN OR EQUAL TO ___
- <> ___ NOT EQUAL TO ___
- : ___ Range search from ___ TO ___



STRUCTURED Hitlist - Select File to View

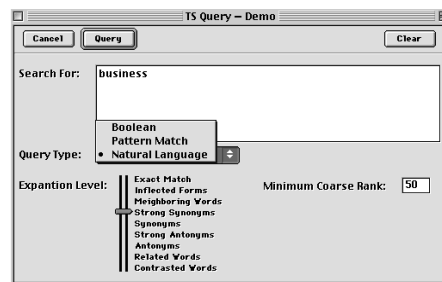
- Open Opens selected file from index
- Re-Query Starts Query again
- Modify Goes to Modify Screen
- Delete Deletes record, file and/or collection (options)
- FormShows selected index row in form view
- Sort by field Click in FIELD TITLE (ascending sort)
- Resize field Drag on arrows at edge of row/column
SHIFT-Click on field Resize to display largest entry
- Move row Drag row to new position in window
- Resize Hit List Drag bottom right corner box to size

Changing Index Information - Modify Form



- Cancel Cancels any change to index information
- Modify Makes the change to index information

TEXT SEARCH QUERY



- Cancel Cancels Query
- Query Starts text search query
- Clear Clears all entry text/strings

TEXT SEARCH Types and Operators

Choose type of text search from popup list; Enter word and operators (if needed); Click Query button.

BOOLEAN Text Search Operators

- * A zero or more character wildcard.
- ? An exactly one character wildcard.
- ~ Forces pattern matching on word.
- ! Specifies semantic expansion for given word.
- "word" Look for exact phrase.
- AND or & Both words or phrases must appear.
- OR or | One or both words or phrases must appear.
- NOT or ^ Word or phrase must not appear.
- WITHIN n Words must appear within n words of each other.
- ADJ n Words must appear within n words, and must appear in order.
- () Allows statements to be nested, and groups operators.

PATTERN MATCHING Text Search Operators

- ! Specifies semantic expansion for given word.
- "word" Look for exact phrase.

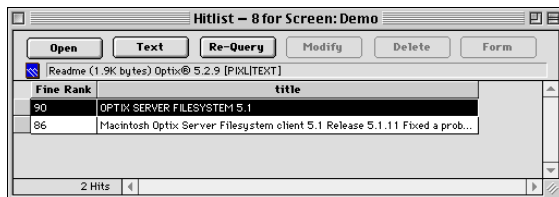
NATURAL LANGUAGE (Concept) Search Operators

- * A zero or more character wildcard.
- ? An exactly one character wildcard.
- ~ Forces pattern matching on word.
- "words" Look for exact phrase.

TEXT SEARCH EXPANSION LEVEL - Example:

1	Exact matches/morphological variants	catch, catches
2	Irregular inflected forms/variant spellings	caught
3	Neighboring words	catchable, catcher
4	Strong synonyms	bag, arrest
5	Synonyms	capture, secure, seize, nail
6	Strong antonyms	miss
7	Antonyms	none
8	Related words	trap, snare, clutch, snatch
9	Contrasted words	free, release

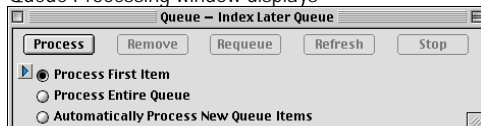
SELECT FILE FROM TEXT SEARCH HITLIST



- Open Opens the selected file
- Text Opens the TEXT file
- Re-Query Starts another Text Search Query

OPTIX QUEUE PROCESSING

Select a Queue from the Screen List Window
Queue Processing window displays



Choose process option, click button to process



Twist-down arrow on left to view items to be processed

Queue Processing Buttons

- Process Starts processing selected item(s)
- Remove Removes selected item(s) from queue
- Requeue Moves selected item(s) to last place in queue
- Refresh Retrieves most recent queue data from server
- Stop Stops all queue processing

ROOT FOLDER

Functional Desktop Folder on Server, available to all OPTIX workstations, regardless of operating system

- Add to Folder Drag item(s) on to folder in list
- Remove from Folder
- View Folder Items Double-click on Folder in list

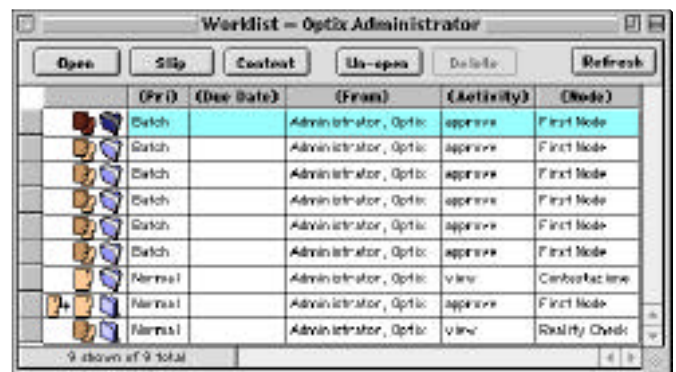
Folder Menu

- Open Home Folder If user has home folder, opens it. If not, nothing happens. (CMD-O)
- New Folder Creates New Optix Folder (CMD-N)
- New Place Holder Creates New Optix Folder Place Holder (CMD-K)
- Delete Item Deletes Folder Item
- Synchronize Folder Refreshes Folder File Listing from Optix Server (CMD - =)
- Get Item Info Displays Folder File Info – change filename here (CMD-I)
- View [by] Arranges folder file view by (name, icon, ...)
- Clean Up Cleans up icon views of Folder
- Arrange Arranges icon views of Folder
- Auto-Arrange Automatically arranges new items in Folder
- Root Folders Create / Modify Optix Root Folders
- Template Folders Create / Modify Optix Template Folders

WORKFLOW Menu

- Show My Worklist Shows user's worklist
- Show Worklist... If user is supervisor, shows worklist for any user in supervisory group
- Show Process List Displays Process (Workflow Route) List for creation / modification of Optix Workflow Routes

WORKFLOW Worklist



- First Column: Who / Why
- Pri: Priority (server configuration option)
- Due Date Due Date on Node (server configuration option)
- From User Name of user who sent item
- Activity Assigned Node Activity (view, approve, select ...)
- Node Node Name in Workflow Route

Worklist Buttons

Open	Opens Routing Slip and Work Item Folder / Package
Slip	Opens ONLY Routing Slip for work item
Content	Opens ONLY Work Item Folder / Package
Un-Open	Un-opens Work Item in Work List
Delete	Deletes selected work item
Refresh	Obtains newest work items from Optix Server

Work Item Routing Slip Buttons & Tabs



Routing Slip Tab

Open	Opens Work Item Folder / Package
(VIEW)	Step Done Moves Work Item to next node
(APPROVE)	Accept / Reject – Moves Work Item to next node according to route definition for Accept / Reject options.
(SELECT)	Select Moves Work Item to next node according to route definition for the different selected options.
Delegate	Delegates Work Item via CC, Delegate or Proxy
Modify	Changes Routing Slip information for Work Item
Proc Info	Displays Process Information for Work Item

Comments Tab

Comments from Prior Step	Displays existing comments
My Comments to Next Step	For adding comments at this node

Nodes Tab

Node(s) appended to workflow work item.
One note kept for the entire workflow process sequence.

Delegations Tab

Delegation History / Information for Workflow Work Item.

Other Information Tab

Work Item State, Priority, In Date, Open Date, Step Due, Process Due
No modifications allowed.

VIEWING A FILE

OPTIX WORKSTATION APPLICATION

File Types Recognized by OPTIX

IMAGE	TIFF, PICT, JPEG, Other (USPTO, Alpharel, etc.)
TEXT	TEXT, RTF, Other
SOUND	AIFF
FORM	OPTIX Form File
COLLECTION	PIXD, Group of files
COD	Computer-Originated Files of any file type or application origin (viewed in other application)

GENERAL OPTIX WINDOW CONTROLS



Link Icon (Blueridge Icon in Title Bar)
Drag to create hyperlink to another file.



Link List Button (in Tool Bar)
Click to display hyperlinks for the file.



Read/Write Button (Pencil icon)
Indicates read/write status of the file.

Info (I) Button Click to see window showing file information.
Status Area (Text Display)
Displays current file status.

IMAGE FILE DISPLAY



Zoom Tool (+, -) Zooms into (+)/out of (-) an IMAGE file; Drag for Marquee Zoom

Option + Zoom Tool
Reverses zoom tool

CMD + Zoom Tool
Temporary switch to the hand tool

Select Box Selects area (for copy/cut).

Hand Tool Grabs and drags zoomed image in window
CMD + Hand Tool

Temporary switch to the zoom (+) tool

Ruler Displays Measure/ Set Measurements windows.

Annotate Displays annotations palette to create annotations on IMAGE file.

Rotate Left Rotates IMAGE Left (also CMD-L)

Rotate Right Rotates IMAGE Right (also CMD-R)

TEXT FILE DISPLAY



Text File Tool Bar

Font Popup List Selects Font

Font Size Popup List Selects Font Size

BOLD Button Selected font becomes bold.

ITALICS Button Selected font becomes italicized.

JUSTIFICATION Buttons Selected paragraph becomes right, left, center or full justification.

PARAGRAPH SPACE Buttons Selected paragraph becomes single, double or triple-spaced.

TAB Buttons Selects tab type: left, center right or decimal tab.

SHOW PARAGRAPH Button Shows hidden formatting characters when selected.

Text Menu:

Text Settings Sets all font characteristics from a single dialog

Size Select text size

Style Select text style

Justification Select paragraph justification

Spacing Select paragraph spacing

Show ¶ Show/Hide hidden characters

Show/Hide Text Search Hits

Show/Hide hits from Text Search query

SHOW TEXT SEARCH HITS

Press CMD-J to see text search hits in a text file

EDITING TEXT FILES

Four ways to CREATE a text file:

1. Type information into new text file.
2. OCR an image file to create a new text file.
3. Cut/Copy and paste into new text file.
4. Open TEXT or RTF file from OPTIX using MacOS Filesystem File-Open command.

SOUND FILE DISPLAY



RECORD Button Creates a new sound from microphone or replaces existing sound.

PLAY Button Plays recorded sound.

STOP Button Stops playing sound.

COLLECTION FILE DISPLAY



Next/Previous Item Buttons	Moves to the next or previous item
Next/Previous Tab Buttons	Moves to next or previous tab
Placeholder Button	Creates or replaces a placeholder
Collection Display Buttons	Displays large or small thumbnails or text for collection items
Up/Down Arrow Key	Moves to previous/next page
Right/Left Arrow Key	Moves to previous/next page
Home Key	Moves to first image
End Key	Moves to last image
Page Up/Page Down	Moves to previous/next image

EDITING COLLECTION FILES

ADD to a collection:

1. Drag item into collection display window.
2. Drag file's Link (Blueridge) icon into collection display window.
3. Use Scan menu options to create or add to a collection.

Collection Tab

Click low right corner of thumbnail to set tab
Use Next/Previous Tab buttons on Tool Bar to tab

Collection Placeholder

Drag Placeholder icon into coll'n. to create Placeholder
Drag Link Icon in place of Placeholder to replace

OPTIX COMMANDS AND KEYSTROKES

File Menu (Optix Workstation Viewer)

CMD + N	creates a New filer (image, text, folder, other)
CMD + O	Opens a file (image, text, folder, other)
CMD + W	Closes the currently active Window / file
CMD + S	Saves a file
CMD + P	Prints a file

Edit Menu (Optix Workstation Viewer)

CMD + Z	Undoes the last action
CMD + X	Cuts a selected area from an image
CMD + C	Copies a selected area or item
CMD + V	Pastes the cut/copied item
CMD + A	Selects All of the active image display

Folder Menu (Optix Filesystem)

CMD + F	Open Home Folder
CMD + N	Create New folder
CMD + K	Create New Place Holder (Folder)
CMD + =	Refresh Folder Contents
CMD + I	Get Folder Item Information (Change Name)

Workflow Menu (Optix Filesystem)

CMD + M	Show My Worklist
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Server Menu (Optix Filesystem)

CMD + L	Log On/Off of Optix Server/Local
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Windows Menu (Optix Filesystem)

CMD + (#)	Display Window # on top
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Tool Menu (Optix Workstation Viewer)

CMD + R	rotates Right 90 degrees
CMD + L	rotates Left 90 degrees
CMD + [Zoom image smaller
CMD +]	Zoom image larger

Scan Menu (Optix Workstation Viewer)

CMD + I	scan an Image
CMD + D	scan a Collection

Text Menu (Optix Workstation Viewer)

CMD + T	Shows the Text settings dialog for text file
CMD + J	Shows hidden formatting characters in text file

FLOATING WINDOWS

Show/Hide Open COD Files	Shows all COD files opened from OPTIX Filesystem.
Show/Hide Mouse Position	Measures image items; can set custom measurements.
Show/Hide Statistics	Statistics on file transfer, file processing (decompression)
Show/Hide Annotation Tools	Annotations Tool Palette
Show/Hide Filesystems	Filesystems available
Show/Hide Form Options	Options for creating/editing a form.

PRINTING

File Print or CMD + P	Prints item in active window (IMAGE, TEXT or COLLECTION)
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SCANNING

Scan Menu Options (Optix Workstation Viewer)

Scan Image (CMD + I)	Scans single image file
Rescan	Rescans single image
Scan Collection (CMD + D)	Scans a collection
Scan and Append	Scans and appends to open collection as a block
Scan and Insert	Scans and inserts into collection as a block
Scan Reverse Sides	Scans and inserts as reverse sides of existing pages
Scan with Pagination	Scans and inserts as certain pages
Select Scanner	Chooses Scan Driver for next scanning session
TWAIN Acquire	Acquires a TWAIN-compatible driver for OPTIX scanning
TWAIN Select Source	Selects TWAIN-compatible scanner
Scanner Settings	Shows selected scanner's dialog to set scan options

OPTIX WORKSTATION PREFERENCES

General Preferences

Startup	Options for starting OPTIX
Windows	Options for display windows (IMAGE, TEXT, COLLECTION)
Checkout	Options for checking out files from an OPTIX filesystem
Filenames	Options for automatically assigning file names

Text Preferences

Text Saves	Options when saving TEXT files
Text Search	Show hits on display, scroll to first hit

Image Preferences

Image Display	Options for IMAGE display
Image Printing	Options for IMAGE printing
Screen Paint	Options for fast/slow/high quality screen print
Zooming	Automatic zoom level settings
Blank Image	Options for size/resolution of new, blank IMAGE
Image Saves	Options for automatic IMAGE saves
JPEG	Options for JPEG IMAGE files, compression level
TIFF	Options for TIFF IMAGE files, compression type and color depth
DeSkew	Options for automatic deskewing
Annotations	Options for saving annotations on an IMAGE
Alpharel	Options for Alpharel IMAGE file type

Collection Preferences

Collections	Options for COLLECTION display (thumbnail/list)
Collectn Scan	Patch cards, auto-processing and save options
Thumbnails	High or Low resolution thumbnail display

OPTIX SERVER FILESYSTEM COMMANDS AND KEYSTROKES

Keystroke Commands

CMD-E	File – Add an Empty Index record
CMD-O	File – Open Query
CMD-P	File – Print
CMD-Q	File – Quit OPTIX FILESYSTEM
CMD-A	Edit – Select All
CMD-C	Edit – Copy selected item
CMD-V	Edit – Paste
CMD-X	Edit – Cut
CMD-N	Folder – New Folder
CMD-H	Folder – Open Home Folder
CMD-I	Folder – Get Item Info
CMD-K	Folder – New Place Holder
CMD-M	Workflow – Show Worklist
CMD-L	Server – Log On

INDEXING

1. Choose Filesystem (OPTIX or MacOS)
2. File Save or CMD + S to save file.
- 2a. **UNDER OPTIX FILESYSTEM ONLY:**
 - Option + File - Save
 - To save file to filesystem WITHOUT index information
 - (for saving a file for a collection without its own index info)

OPTIX FILESYSTEM PREFERENCES

Opening Files	Show Revisions on Open/Show Latest
	Revision
Hitlist	Display
Optix File	File Types and Extensions to open using OPTIX
Checkout	File check in/check out options
Folders	Open home folder after login
Workflow	Worklist display
Server	Timeouts